

Basic Instructions for using Austin Turf Quote System  
(as of 03/29/99)

1. There are 6 basic files to system: 1 Excel workbook-Quotes.xls which salesman will use to enter quotes. The workbook Template EquipmentT in the Office 97 Templates folder which will be the template for creating Equipment workbooks to hold up to 16 pieces of equipment. These are kept in the Equipment Books folder in My Documents which also has a workfile, EquipNum which you will not directly use. Also two Word documents (Quotes.doc and Quotes2.doc) which are templates for printing the final quote. The 6<sup>th</sup> document is GolfurpricingT.xlt which is a template for new, blank equipment worksheets.
2. If not done, copy the Quotes.xls workbook, the Equipment Books and the 2 Word documents to your "My Documents" folder. Copy the EquipmentT and the GolfurpricingT to the Templates folder for Microsoft Office97. (Likely in: c:\Program Files\Microsoft Office 97\Templates)
3. Everything has been done to minimize errors and ensure problem free usage. However, it is normal to find some bugs in new software. To help the process of correcting them, please fill out the info requested on the Bug Reporting form. This is necessary to find and fix the problem.
4. To do data entry:
  - a. Click on the Equipment workbook shortcut-this will create a new, blank workbook to enter equipment into.
  - b. Once open, click on the Data Entry button at the top left for each new worksheet you wish to enter a piece of equipment.
  - c. Enter the equipment piece(s) desired-one to a worksheet. This mirrors your standard paper equipment specs sheet with its 3 basic sections. Note proper column headings for each item.
  - d. In the top section of about 20 cells, the Features are entered. Enter each going all the way down, before across if need to. This is because the ten items on the left-hand side will be transferred to the quote, so enter the top ten here.
  - e. In the top Required section, BE SURE TO ADD AN ASTERISK(\*) BEFORE EACH INDIVIDUAL ITEM(this section only). The system uses this to detect a new item.
  - f. If you need to add line(s) for a given section: 1) for the Required top section – if you need to add a whole sub-section (i.e. title and components as Reel Front Rollers title and the individual components-enter a "\" (without quotes) in the last column (M-the Ref2) and double-click on the column L (in same row) before it. This will add a title line and I believe a couple of spec lines. 2) To add one spec line to either a sub-section of the Required section, or to the "Desired" or "Field" sections below it, enter a "(" (no quotes) to column "M" again, and again double-click on column "L". One line will be added below where you just clicked on. You can only append lines to the end of a section, not in-between a given section.
  - g. You can use more than one line for the description for any item, but be sure to enter the other elements on the first line(unit price, setup,weight,etc). And be sure to enter the description that will go on the quote on the first line of the description(only 1<sup>st</sup> line of description will be transferred to quote).
  - h. Enter BM numbers at the far left column for a given item, one BM number per cell, and going down to enter additional BM numbers. Be sure none of the numbers run alongside other items descriptions(so the asterisk above) so just use additional lines if you need to even if only for the BM numbers.
  - i. Under Setup, enter the unit hours labor for one piece of equipment.
  - j. In entering the Ref1 figure, unlike your normal way, if the amount is a deduct(negative number)append an "X" (uppercase, no quotes) to indicate such to the system
  - k. Be sure and save your work. Be sure to use the Save Data button near the bottom and not the Excel File menu save button or else the file will not be saved correctly(for Data Entry only).
  - l. Each workbook can hold up to 16 pieces of equipment, or less if desired. Each workbook will be automatically saved with the proper title in the format "Equipment Volx" where "x" is the volume number.
  - m. For each Equipment Vol workbook created, be sure to open the Quotes.xls workbook and enter the exact workbook title and its associated contents(the name of each piece of equipment as designated on its worksheet tab).The workbook title (for example Equipment Vol2) goes in column A. The associated contents are entered in the second column(B). Do not enter anything other than this information in these two columns. Be sure to enter the workbooks in order, beginning where designated on the worksheet and without leaving any spaces between numbers. (sample given-but be sure to erase sample data before using)

5. To enter a quote:
  - a. Open the Quotes.xls workbook
  - b. A pop-up window will eventually appear listing the available equipment workbooks and the contents of each volume (from Equipment workbooks you entered equipment into).
  - c. Click on sheets you want to pull in. **BE SURE TO ONLY SELECT EQUIPMENT ITEMS FROM ONE BOOK AT A TIME.** If you need to select items from more than one book, do so in separate operations. But you can select any or all of the equipment pieces from a given workbook at a time. Click select. The sheets you selected will be copied in.
  - d. Click on a worksheet you want to do. When open, click on the "Create Quote" button at top left. If you leave the current worksheet, you will need to re-click the Create Quote button (but will not lose work)
  - e. Enter the proper quantities for the items you want in each of the 3 sections. Remember to pick at least one of each required item. The quantity must be entered on the first line of the description, which should also be the same line as other elements (price, etc)
  - f. Setup costs will be calculated based on the quantities you enter times the setup hours for a given piece. Be sure you have entered the proper Setup labor rate down below to the right in the Salesman figures section
  - g. When an item is selected by entering a quantity, use the Tab key to go forward and also so extensions will be calculated (or click on that line to extend). The Ref1 will be extended (times quantity) as Ref2. Remember that if Ref1 is negative ("X" appended), Ref2 will also indicate a negative/deduct with an "X" appended.
  - h. Below the 3 sections is the Totals section. Basically, you click on any box to calculate the totals thus far (assuming required items entered). You will get a pop-up warning if one of the required items is not selected. Enter any discounts and freight \$ amount (Poundage totaled on right side. Setup is totaled for you as well as Total List. For John Deere Preferred or Regular discount you can enter the dollar amount or the % amount to calculate the dollar amount (this not quite working fully). For the Austin discount, you can enter the dollar amount or % and the margin will be calculated. Or you can enter the margin % (e.g. .20) as indicated below; then put the letter "C" or "c" (without quotes) in the box for Austin discount \$ amount and double click the Sale Price box and the system will calculate the discount amount based on the margin amount you entered, as well as the Sale Price.
  - i. If you need to change anything, just enter a new quantity, change a quantity, or delete a quantity to unselect an item. Be sure to tab forward or click the changed line to extend the new values
  - j. To the right, off the 1<sup>st</sup> screen (where customer can't see it) is a set of Salesman figures. These include the Total cost (sum of Ref2) and the Net Cost (Total cost plus setup and freight less ½ any Preferred discount and/or any JD Regular discount; the margin which can be entered or calculated as mentioned above; and a % discount for JD Regular and Austin discount. You can enter the % amount to calculate the \$ amount here, or let it calculate the % based on entering the \$ amounts and/or calculating as noted above for Austin discount. If you need to change or re-enter anything below (salesman boxes or totals section), just double-click on the Sale Price totals box to re-calculate.
  - k. When you are satisfied with that piece's quote, then click on the "Add To Quote" button to the right of the Totals section. This will send the quote to the Quote Worksheet. Each quote you figure will thus be added to the Quote worksheet with a running Grand Total.
  - l. When you've finished adding your entire quote to the Quote worksheet, you can then review it and click the Print quote button to print a paper copy for your client. This will eventually save a copy of the quote for you. If you need to re-do a quote, you can click the Clear button to clear the Quote worksheet and start over. Be sure you never manually delete the items on the Quote sheet, especially the section for the first quote.
  - m. If you want to leave a quote and come back, for the Quotes workbook only, you can use the File menu Save selection to save your work (Quotes only; for Data Entry see above).
  - n. When you are completely through with a quote and wish to clear the workbook for the next quote, click on the "Clear and Exit" button. This will both clear the Quote worksheet, and delete any Equipment worksheets added.
6. Be careful to not attempt to alter any settings background or font color, font size or type, formatting, etc. (any of menu or bar settings. Also be careful to not change the application sections or anything else except as described above. You can delete blank, unused lines from sections or sections themselves, but do not eliminate any section itself. (If you do not use a given section, leave 2 or 3 blank lines).

If you have any questions, newly discovered bugs, or suggestions please feel free to contact me at 210-342-2833(San Antonio phone) or email at [vmabrito@aol.com](mailto:vmabrito@aol.com).

Thanks, Van S. Mabrito